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CallPilot 100/150

Desktop Messaging Installation and Maintenance Guide

NORTEL NETWORKS

CallPilot 100/150 Desktop Messaging Installation and Maintenance Guide

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Chapter 1
Requirements for installing Desktop Messaging

About CallPilot Desktop Messaging

With CallPilot Desktop Messaging from subscribers can access their CallPilot mailbox from their personal computer. Subscribers can manage all their voice messages in one graphical interface. They can still access their mailbox from their telephone at any time.

With CallPilot Desktop Messaging subscribers can:

- listen to voice messages
- record and send voice messages
- forward and reply to voice messages
- add message options such as urgent and private
- change their CallPilot password

This guide tells a System Administrator how to install, configure and troubleshoot CallPilot Desktop Messaging on subscribers' computers.

Subscribers can perform some configuration and troubleshooting tasks with your guidance.

Hardware requirements

The following list contains both the minimum and recommended hardware that Desktop Messaging software needs for operation.

- IBM PC or compatible:
  - — minimum Pentium/586 or faster system with 16 Mbytes of RAM minimum; 32 Mbytes recommended
- Monitor:
  - — 16-color VGA 640 x 480 capability minimum; 256-color SVGA 800 x 600 capability recommended
- Disk drive:
  - — 15 Mbytes of free space
- CD-ROM drive
- Windows-compatible mouse and keyboard
- LAN connection to CallPilot 100/150. Subscribers can access their CallPilot messages over the LAN via ISDN, ADSL, dial-up modem or ethernet.

Optional hardware

- a sound card and a set of speakers for playing messages on a computer
- a microphone for recording messages on a computer

Software requirements

Integrated clients

Integrated clients run with a corporate email server. You can use Desktop Messaging with one or more of these clients:

- Microsoft Outlook 98 in Corporate mode
- Microsoft Outlook 2000
- Microsoft Outlook 2002 (XP)
- Lotus Notes 5.x, 6.x
- GroupWise 6.x

Note: If you want to use Lotus Notes 6 you must have version 2.0 installed. To install Desktop Messaging for Lotus Notes, you must have manager or designer control of the user's mail database. This control is set on the server by the Lotus Notes administrator.

Note: Desktop Messaging does not support the Microsoft Windows Terminal Server running the Citrix client.

Internet Mail clients

You can use Desktop Messaging with these IMAP Internet clients:

- Microsoft Outlook Express 5.x and 6.x
- Microsoft Outlook 98, 2000 and 2002 (XP) in Internet mail mode
- Netscape Messenger (Netscape Communicator) 4.7x, 6.2x, 7.0x
- Qualcomm Eudora Pro 5.x

Operating systems

- Windows 95B
- Windows 98 SE
- Windows 2000
- Windows XP
- Win NT 4.0 SP6a

Related documents

For information about how subscribers use CallPilot Desktop Messaging, refer to the:

- *CallPilot 100/150 Desktop Messaging Quick Reference Guide*
- CallPilot Unified (Desktop) Messaging online Help and online guides
- *CallPilot Reference Guide* for CallPilot 100/150

For information about setting up CallPilot Message Networking refer to the:

- *CallPilot Message Networking Set Up and Operation Guide*
- *CallPilot Manager Set Up and Operation Guide*

Where to get help

USA and Canada

Authorized Distributors - ITAS Technical Support

Telephone:
1-800-4NORTEL (1-800-466-7835)
If you already have a PIN Code, you can enter Express Routing Code (ERC) 196#.
If you do not yet have a PIN Code, or for general questions and first line support, you can enter ERC 338#.

Website:
http://www.nortelnetworks.com/itas/

email:
naitas@nortelnetworks.com

Presales Support (CSAN)

Telephone:
1-800-4NORTEL (1-800-466-7835)
Use Express Routing Code (ERC) 1063#

EMEA (Europe, Middle East, Africa)

Technical Support - CTAS

Telephone:
00800 800 89009

Fax:
44-191-555-7980

email:
emeahelp@nortelnetworks.com

CALA (Caribbean & Latin America)

Technical Support - CTAS

Telephone:
1-954-858-7777

email:
csrmgmt@nortelnetworks.com

APAC (Asia Pacific)

Technical Support - CTAS

Telephone:
+61 388664627

Fax:
+61 388664644

email:
asia_support@nortelnetworks.com

Chapter 2
Configuring your system for Desktop Messaging

Before you install Desktop Messaging

Before installing and using Desktop Messaging:

- In CallPilot Manager, make sure that the number of Maximum Outcalling Channels is enough to accommodate the expected CallPilot telephone player use. The Outcalling Channels value controls the number of simultaneous channels that can be used for outcalling. For information on setting the outcalling channels, refer to the *CallPilot Manager Set Up and Operation Guide*.

- If you are installing Desktop Messaging for subscribers who use Outlook 98 or Outlook 2000, make sure their clients are set to the proper mode. For more information refer to "Software requirements" on page 8.

Desktop Messaging and data network security

Due to the complexity and diversity of network configurations, this guide does not cover data network security issues. Discuss security issues with a security specialist or data network administrator.

Configuring IMAP/LDAP/SMTP servers for Desktop Messaging

CallPilot supports IMAP/LDAP protocols, which let Desktop Messaging subscribers access their CallPilot mailboxes using Microsoft Outlook, Lotus Notes, Novell GroupWise, and selected third-party Internet mail clients: Microsoft Outlook Express, Netscape Messenger, and Qualcomm Eudora Pro.

Each type of desktop client is configured and used slightly differently. To configure a specific Desktop client, refer to "Installing and configuring Desktop Messaging" on page 15.

Although you individually configure each desktop client, you configure CallPilot 100/150 the same way for all the Desktop clients it supports. Follow the instructions in this chapter to configure the IMAP/LDAP/ SMTP servers.

IMAP

Internet Message Access Protocol (IMAP) lets a client access and use electronic mail messages on a server. These messages are stored on CallPilot 100/150.

IMAP lets subscribers check for messages from any location with an Internet connection. IMAP also lets subscribers access messages from multiple locations. IMAP is a method of accessing electronic mail or bulletin board messages that are kept on a shared mail server. IMAP lets a client email program access remote message stores as if they were local. For example, email stored on an IMAP server can be accessed from a computer at home, a workstation at the office, and a notebook computer while traveling, without the need to transfer messages or files between computers.

LDAP

Lightweight Directory Access Protocol (LDAP) is a set of protocols for accessing information directories. LDAP supports TCP/IP, which is necessary for any type of Internet access. LDAP lets a client search for and use information entries on a directory server, such as CallPilot 100/150. For example, a typical entry in the CallPilot directory contains attributes of a subscriber such as name, telephone number, and CallPilot mail address. Internet clients can use LDAP to query address book information from the CallPilot directory, perform address resolution, or search for specific subscribers, if this functionality is implemented by the Internet client.

SMTP

Simple Mail Transfer Protocol (SMTP) is a protocol for sending email messages between servers. Most email systems that send mail over the Internet use SMTP to send messages from one server to another. These messages can then be retrieved with an email client using IMAP. SMTP is also generally used to send messages from a mail client to a mail server. This is why you must specify both the IMAP server and the SMTP server when you configure your email application.

Since Voice Profile for Internet Mail (VPIM) Networking also uses SMTP, you do much of the configuration for IMAP in the same places you set up VPIM Networking.

Configuring environments without a DNS

The Domain Name System (DNS) is an Internet service that translates domain names into IP addresses. Because domain names are alphabetic, they are easier for subscribers to remember. The Internet is based on IP addresses. Every time you use a domain name, therefore, a DNS must translate the name into the corresponding IP address. For example, the domain name www.example.com can translate to 198.105.232.4.

If one DNS server does not know how to translate a particular domain name, it asks another one, and so on, until the correct IP address is returned.

Desktop Messaging uses Domain Name resolution, which is provided by a DNS. If your network does not have a DNS, then you must configure Desktop Messaging to use IP addresses.

Configuring Desktop Messaging with IP address only

If you do not use DNS to resolve domain names, configure CallPilot 100/150 and client computers to use an IP address only:

1. Ensure your CallPilot 100/150 system is not configured to use DNS.
2. Enter the host name on CallPilot 100/150.
3. Configure computers running Desktop Messaging with the IP address of CallPilot 100/150.

Chapter 3
Installing and configuring Desktop Messaging

It takes approximately 10 minutes to install CallPilot Desktop Messaging. Depending on the subscribers' expertise, you can ask them to install Desktop Messaging on their computer.

Installation information

Before you install CallPilot Desktop Messaging on a subscriber's computer:

- Make sure the subscriber's computer has the correct hardware and software requirements. Refer to "Hardware requirements" on page 7 and "Software requirements" on page 8.

- If the subscriber has version 1.06 or earlier of Desktop Messaging, you must uninstall the earlier version before you do the installation procedure.
  Refer to "Uninstalling an earlier version of Desktop Messaging" on page 16.

- Decide which version of Desktop Messaging you want to install.
  Refer to "Choosing which version of Desktop Messaging to install" on page 17.

- Ensure that the microphones, speakers, and sound cards that are connected to the subscriber's computer are configured. Refer to the manufacturer's documentation.

- Have this information available:
  - the fully qualified domain name (FQDN) of CallPilot 100/150, or the IP address, if you do not have a DNS
  - the SMTP/VPIM prefix of CallPilot 100/150. If you use Message Networking, include this prefix.
  - the subscriber's mailbox number

Note: If the subscriber uses Novell GroupWise they must have Windows Messaging 4.0 installed on their computer. This is normally the case when Windows is installed on a computer. However, if Windows Messaging 4.0 is not installed, the GroupWise installation gives you these options:

- Install the complete Windows Messaging system.
- Leave Windows Messaging as is.

Install the Complete Windows Messaging system even if Windows Messaging is already installed. This ensures that the GroupWise option is available during Desktop Messaging installation.

Uninstalling an earlier version of Desktop Messaging

If the subscriber has Desktop Messaging 1.06 or earlier on their computer, uninstall it before you do the installation procedure.

To uninstall a previous version of Desktop Messaging

1. Quit any open applications, including the Desktop Messaging installation program.
   If you use Microsoft Outlook, it can take an additional minute or two for the mail services to shut down.
2. Click the Windows **Start** button, point to **Programs**, point to **Nortel Networks CallPilot Desktop Messaging** and click **Uninstall CallPilot Desktop Messaging** for the specific email client. The Uninstall window appears.
3. Click the **Uninstall NOW!** button.
4. If a message appears that asks if you want to delete any files beginning with the letters nb, nm, or ns, click the **Yes** button.
5. If you are uninstalling Desktop Messaging for Lotus Notes, you must enter your Lotus Notes password before the uninstall process continues.

If you are Installing Desktop Messaging for Outlook and GroupWise

If you want to install Desktop Messaging for both Microsoft Outlook and Novell GroupWise on the same computer, you must install each client separately.

1. The first time you install Desktop Messaging, select the Outlook email client only, and when you reach the **Additional Options** screen, select **Update default mail profile**.
2. Install Desktop Messaging a second time, and this time select the Novell GroupWise email client only. When you reach the **Additional Options** screen, select **Update default mail profile**.

Setting up Microsoft Outlook 2000 in Corporate mode

If the subscriber is using Microsoft Outlook 200 as an integrated client that runs with a corporate email server, before you install Desktop Messaging, make sure the subscriber is in Corporate mode.

1. Start Outlook 2000 on the subscriber's computer.
2. On the **Tools** menu click **Options**.
   The Options dialog box appears.
3. Click the **Mail Services** tab.
4. Click the **Reconfigure Mail Support** button.
   The Email Service Options wizard appears.
5. Make sure that **Corporate or Workgroup** is selected.
   If it is not already selected, select it and complete the rest of the wizard.

Note: If the subscriber uses Outlook 98, refer to the Knowledge Base at the Microsoft website for information about configuring Outlook 98 in Corporate mode.

Installing Desktop Messaging

You install Desktop Messaging from the CallPilot 100/150 Documentation and Client Software CD. Be sure to install the version of Desktop Messaging that is right for your system.

Refer to:

- "Choosing which version of Desktop Messaging to install" on page 17.
- "Installing Desktop Messaging version 2.0" on page 18
- "Installing Desktop Messaging version 1.07" on page 24

Choosing which version of Desktop Messaging to install

Which version of Desktop Messaging you should install depends on your language requirements.

Install version 2.0 if you use:

- English
- Chinese
- Dutch
- German
- French

Note: If you want to use Lotus Notes 6 you must have version 2.0 installed

Install version 1.07 if you use:

- Italian
- Spanish
- Danish
- Norwegian
- Swedish
- Brazilian Portuguese

Installing Desktop Messaging version 2.0

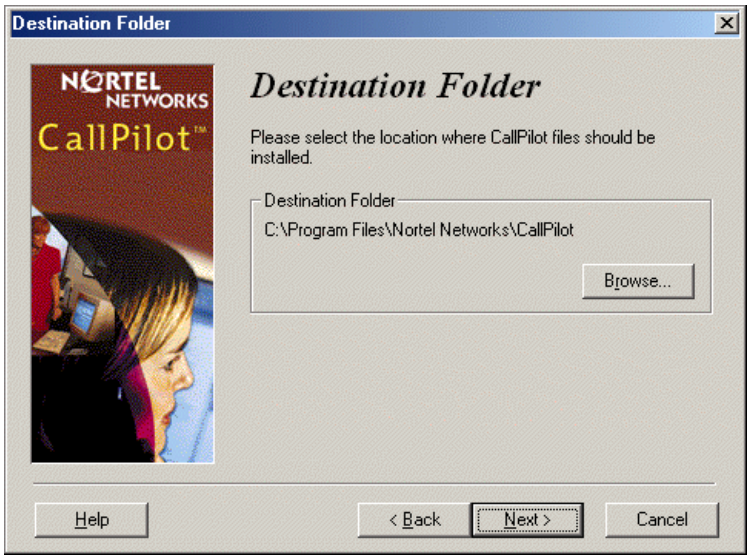
1. Load the **CallPilot 100/150 CD** in the CD-ROM drive of your computer.
2. Double-click the **CD** folder and double-click the **Optional Software** folder.
3. Double-click the **Desktop Messaging** folder.
4. Double-click the folder for the 2.0 version of Desktop Messaging.
5. Double-click the **setup.exe** icon.
   The setup program starts and the Welcome window appears.

Welcome
NORTEL NETWORKS
CallPilot™
Welcome to the CallPilot Desktop Messaging Installation Wizard.
This wizard will guide you through the installation of CallPilot Desktop Messaging.
It is strongly recommended that you exit all Windows programs before running this Setup Program.
Click Cancel to stop the wizard and close any programs you have running.
To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Help
< Back
Next >
Cancel

6. Click the **Next** button.
   The Language screen appears.

7. From the **Language** list box, select the language you want to use.

8 Click the **Next** button.
The Destination Folder screen appears.



9 Click the **Next** button to accept the default directory, or click the **Browse** button if you want to locate other destination folders, and select the folder you want to install Desktop Messaging in.
Nortel Networks recommends that you install Desktop Messaging in the default folder.

10 Click the **Next** button.
The E-Mail Client screen appears.

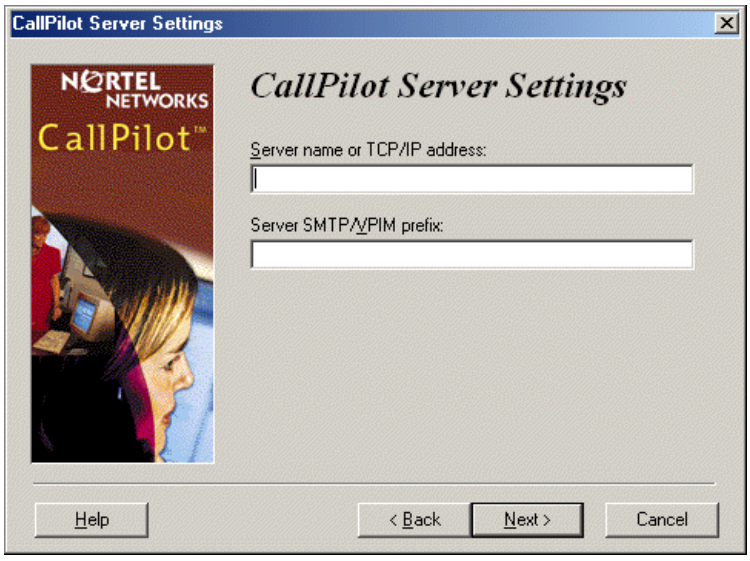
E-Mail client
NORTEL NETWORKS
CallPilot™
E-Mail Client
Please select an e-mail client to access your CallPilot messages. You may select more than one client.
"Free Disk Space After Install"' is based on the clients you have chosen . A negative number indicates that there is not enough disk space.
E-Mail Clients
Microsoft Outlook 6609 k
Lotus Notes 33743 k
Internet Mail clients 265 k
Novell GroupWise 8179 k
Free Disk Space After Install: 4721669 k
Help
< Back
Next >
Cancel

11 Select the check boxes for the email clients that you use.
Internet Mail clients include Microsoft Outlook Express, Microsoft Outlook in Internet mail mode, Netscape Messenger, and Qualcomm Eudora Pro.

Notes:

- If you want to install Outlook and GroupWise on the same computer, you must follow the procedure "If you are Installing Desktop Messaging for Outlook and GroupWise" on page 16.
- If you are using Outlook in Internet Mail mode (rather than Corporate mode), clear the Microsoft Exchange/Outlook option. After you install Desktop Messaging, go to "Configuring Outlook Express or Outlook in Internet Mail mode" on page 36.

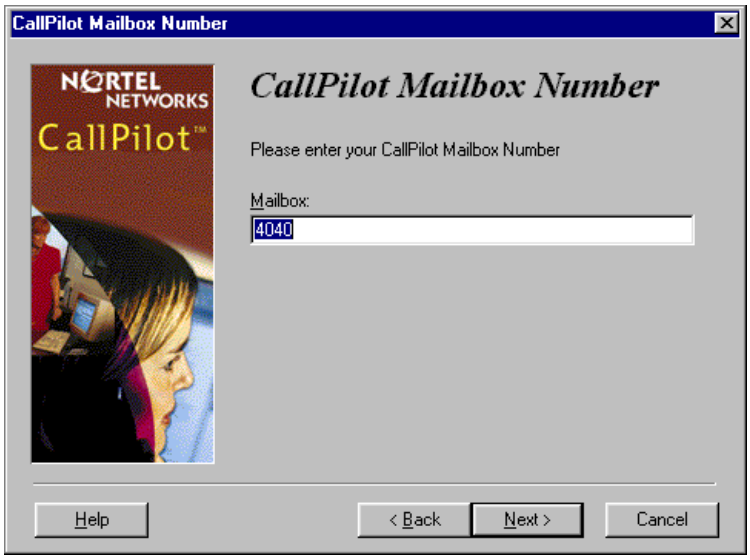
12 Click the **Next** button.
The CallPilot Server Settings screen appears.



13 In the **Server Name or TCP/IP Address** box type the FQDN or IP address of the CallPilot 100/150 system.

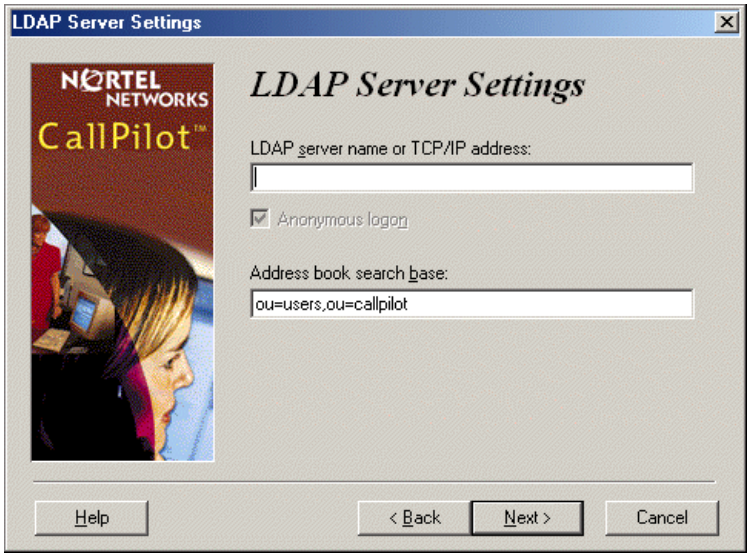
14 In the **Server SMTP/VPIM prefix** box type the SMTP/VPIM prefix of the CallPilot subscriber's address. If CallPilot Networking is not enabled, leave this box blank, otherwise enter the value from the Local Prefix field of the Digital Networking Properties page in CallPilot Manager.

15 Click the **Next** button.
The CallPilot Mailbox Number screen appears.



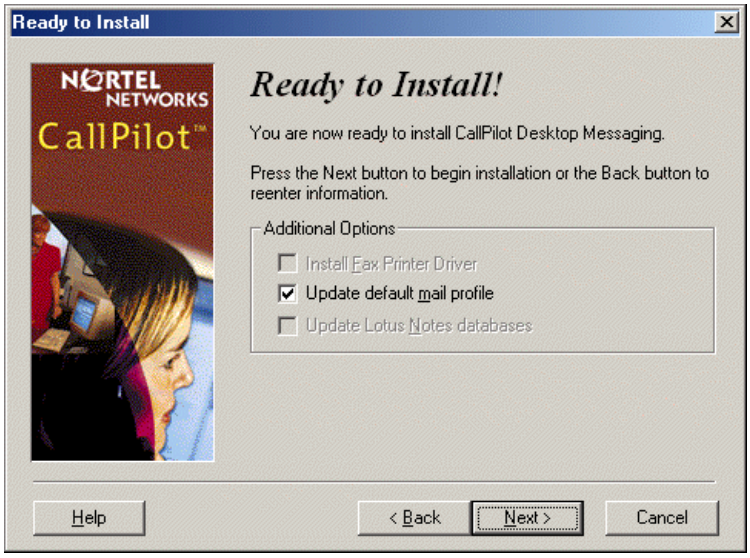
16 Enter the subscriber's mailbox number. The mailbox number is usually the subscriber's extension number.

17 Click the **Next** button.
The LDAP Server Settings screen appears.



18 In the **LDAP server name or TCP/IP address** box type the LDAP server name or TCP/IP address of your system.
We recommend that you do not change the address book search base.

19 Click the Next button.
The Ready to Install! window appears. We recommend you leave the Update default mail profile box selected.


Ready to Install
NORTEL NETWORKS
CallPilot™
Ready to Install!
You are now ready to install CallPilot Desktop Messaging.
Press the Next button to begin installation or the Back button to reenter information.
Additional Options
Install Fax Printer Driver
Update default mail profile
Update Lotus Notes databases
Help
< Back
Next >
Cancel

If you are installing Desktop Messaging for Lotus Notes, you must enter your Lotus Notes password before the installation process continues. The Desktop Messaging installation program tries to detect Lotus Notes by searching for the notes.ini file on the hard drive. If the file is not found, the Lotus Notes option is disabled during installation. If the notes.ini file is located on a server, you can disable Lotus Notes detection to install Desktop Messaging for Lotus Notes. To disable Lotus Notes detection:

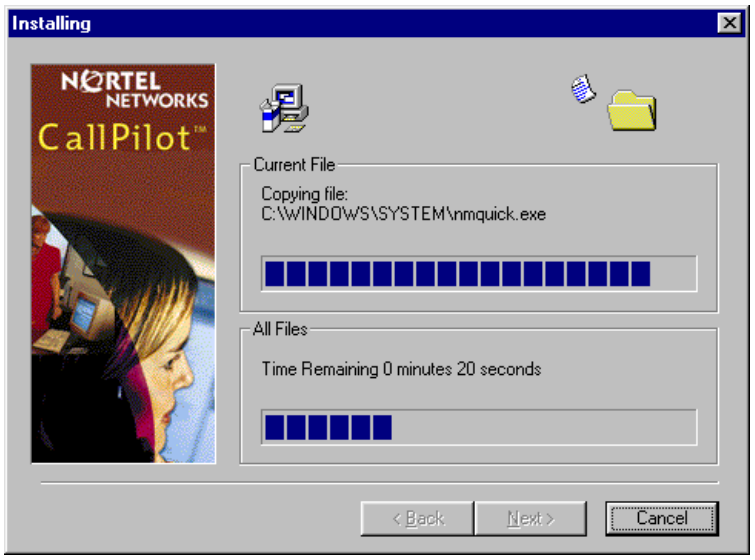
a Quit the Desktop Messaging installation program.

b Click the **Start** button and click **Run**.
The Run dialog box appears.

c In the **Open** box type *setup.exe /ld.*

d Restart the Desktop Messaging installation program.
If you are installing Desktop Messaging on a Windows NT or a Windows 2000 system, a message appears that prompts you to enter your user name and password.

20 Click the **Next** button.
The installation progress bar appears and indicates that files are being copied.



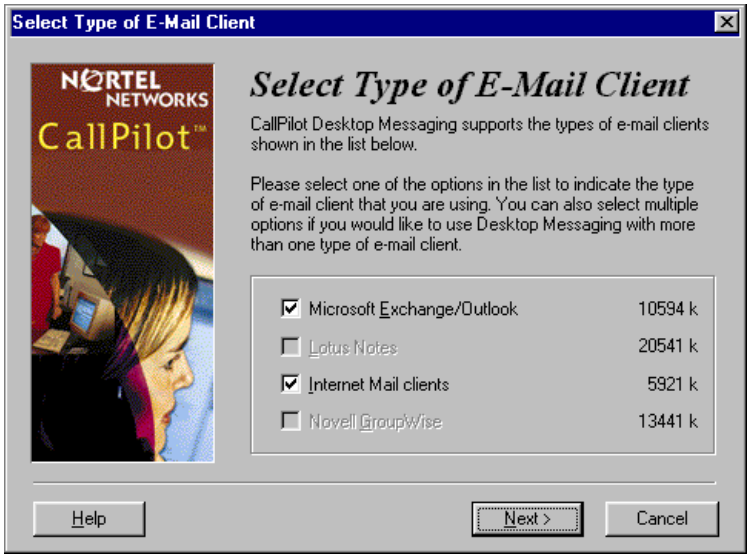
21 Click the **Finish** button to complete the installation.

Installing Desktop Messaging version 1.07

1. Load the **CallPilot 100/150 CD** in the CD-ROM drive of your computer.
2. Double-click the **CD** folder and double-click the **Optional Software** folder.
3. Double-click the **Desktop Messaging** folder.
4. Double-click the folder for the 1.07 version of Desktop Messaging client.
5. Double-click the **setup.exe** icon.
   The setup program starts and the Welcome window appears.

Welcome
NORTEL NETWORKS
CallPilot™
Welcome to the CallPilot Desktop Messaging Installation Wizard.
This wizard will guide you through the installation of CallPilot Desktop Messaging.
It is strongly recommended that you exit all Windows programs before running this Setup Program.
Click Cancel to stop the wizard and close any programs you have running.
To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Help
< Back
Next >
Cancel

6. Click the **Next** button.
   The Select Type of E-Mail Client screen appears.

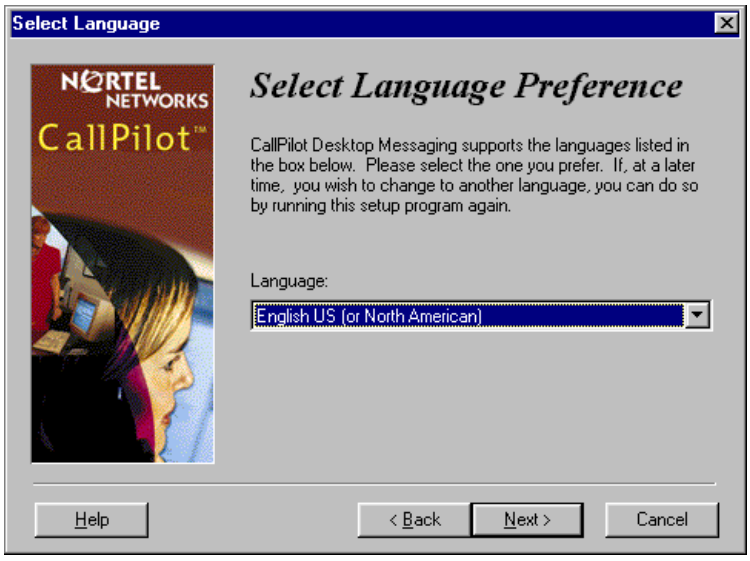

Select Type of E-Mail Client
NORTEL NETWORKS
CallPilot™
Select Type of E-Mail Client
CallPilot Desktop Messaging supports the types of e-mail clients shown in the list below.
Please select one of the options in the list to indicate the type of e-mail client that you are using. You can also select multiple options if you would like to use Desktop Messaging with more than one type of e-mail client.
Microsoft Exchange/Outlook 10594 k
Lotus Notes 20541 k
Internet Mail clients 5921 k
Novell GroupWise 13441 k
Help
Next >
Cancel

7 Select the check boxes for the email clients that you use.
Internet Mail clients include Microsoft Outlook Express, Microsoft Outlook in Internet mail mode, Netscape Messenger, and Qualcomm Eudora Pro.

Notes:

- If you want to install Outlook and GroupWise on the same computer, you must follow the procedure "If you are Installing Desktop Messaging for Outlook and GroupWise" on page 16.
- If you are using Outlook in Internet Mail mode (rather than Corporate mode), clear the Microsoft Exchange/Outlook option. After you install Desktop Messaging, go to "Configuring Outlook Express or Outlook in Internet Mail mode" on page 36.

8 Click the **Next** button.
The Language selection screen appears.


Select Language
NORTEL NETWORKS
CallPilot™
Select Language Preference
CallPilot Desktop Messaging supports the languages listed in the box below. Please select the one you prefer. If, at a later time, you wish to change to another language, you can do so by running this setup program again.
Language:
English US (or North American)
Help
< Back
Next >
Cancel

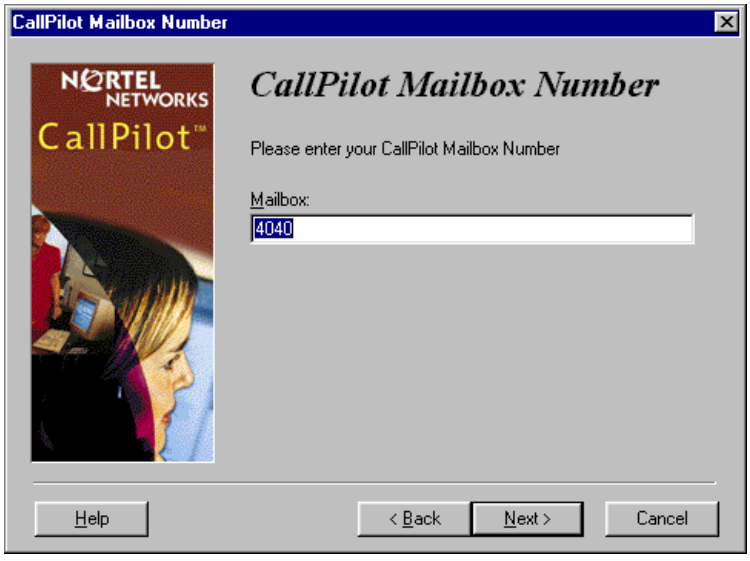
9 From the **Language** list box, select the language you want to use.

10 Click the **Next** button.
The Select Destination Folder screen appears.

Select Destination Folder
NORTEL NETWORKS
CallPilot™
Select Destination Folder
Please select the folder where CallPilot Desktop Messaging files are to be installed.
"Free Disk Space After Install"' is based on your current selection of files to install. A negative number indicates that there is not enough disk space to install the application to the specified drive.
Destination Folder
C:\Program Files\Nortel
Browse...
Current Free Disk Space: 1972828 k
Free Disk Space After Install: 1956313 k
Help
< Back
Next >
Cancel

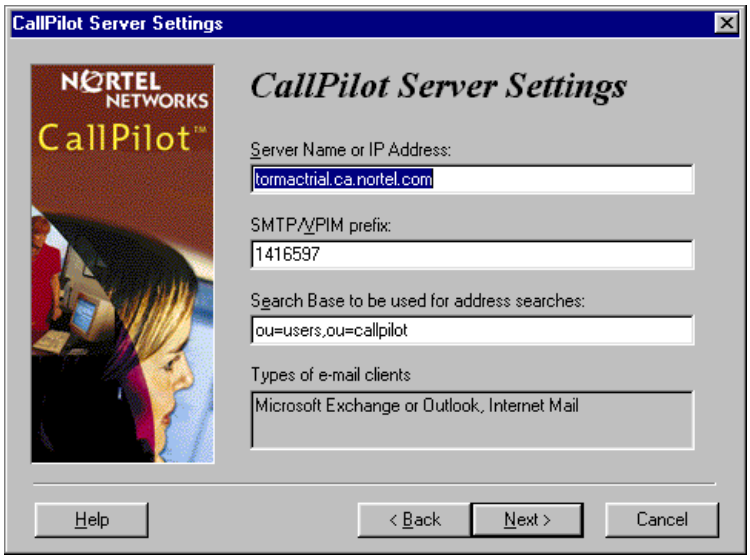
11 Click the **Next** button to accept the default directory, or click the **Browse** button if you want to locate other destination folders, and select the folder you want to install Desktop Messaging in.
Nortel Networks recommends that you install Desktop Messaging in the default folder.

12 Click the **Next** button.
The CallPilot Mailbox Number screen appears.



13 Enter the subscriber's mailbox number. The mailbox number is usually the subscriber's extension number.

14 Click the **Next** button.
The CallPilot Server Settings screen appears.

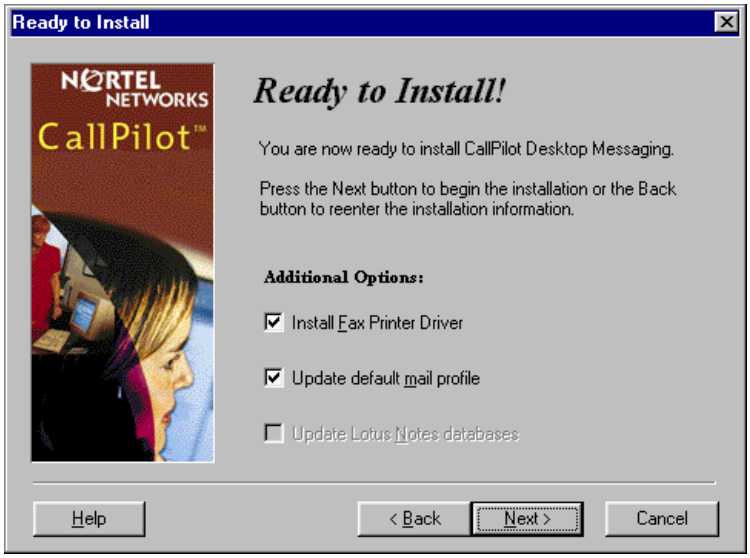


15 In the **Server Name or IP Address** box type the FQDN or IP address of the CallPilot 100/150 system.

16 In the **SMTP/VPIM prefix** box type the SMTP/VPIM prefix of the CallPilot subscriber's address. If CallPilot Networking is not enabled, leave this box blank, otherwise enter the value from the Local Prefix field of the Digital Networking Properties page in CallPilot Manager.

17 Do not change the information in the **Search base** box**.**

18 Click the **Next** button.
The Ready to Install! window appears.
Note: The Fax Printer option is not available on CallPilot 100/150.


Ready to Install
NORTEL NETWORKS
CallPilot™
Ready to Install!
You are now ready to install CallPilot Desktop Messaging.
Press the Next button to begin the installation or the Back button to reenter the installation information.
Additional Options:
Install Fax Printer Driver
Update default mail profile
Update Lotus Notes databases
Help
< Back
Next >
Cancel

If you are installing Desktop Messaging for Lotus Notes, you must enter your Lotus Notes password before the installation process continues. The Desktop Messaging installation program tries to detect Lotus Notes by searching for the notes.ini file on the hard drive. If the file is not found, the Lotus Notes option is disabled during installation. If the notes.ini file is located on a server, you can disable Lotus Notes detection to install Desktop Messaging for Lotus Notes. To disable Lotus Notes detection:

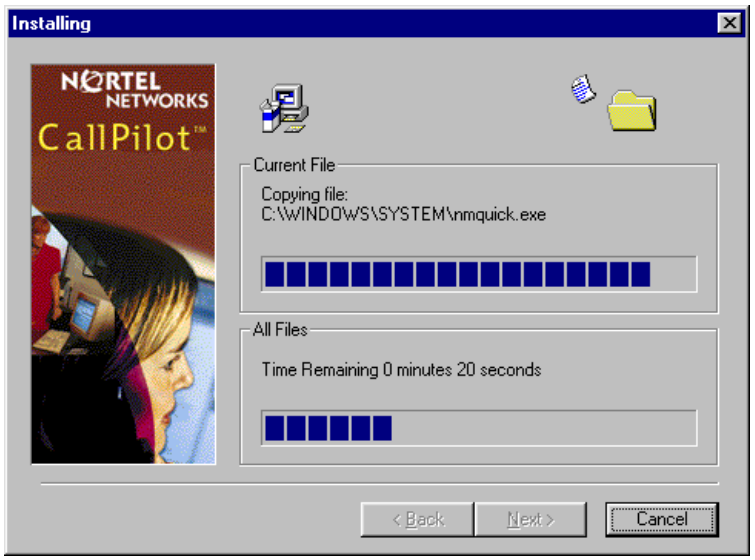
a Quit the Desktop Messaging installation program.

b Click the **Start** button and click **Run**.
The Run dialog box appears.

c In the **Open** box type *setup.exe /ld.*

d Restart the Desktop Messaging installation program.
If you are installing Desktop Messaging on a Windows NT or a Windows 2000 system, a message appears that prompts you to enter your user name and password.

19 Click the **Next** button.
The installation progress bar appears and indicates that files are being copied.



20 Click the **Finish** button to complete the installation.

After you install Desktop Messaging

After you install Desktop Messaging:

- Set the default email client.
- Configure access to Desktop Messaging on subscribers' computers
- Set the Timezone and Daylight Savings Time setting in CallPilot Manager

To set the default email client

1. Click the Windows **Start** button, point to **Settings** and click **Control Panel**.
   The Control Panel window appears.
2. Double click the **Internet Options** icon.
   The Internet Properties window appears.
3. Click the **Programs** tab.
4. In the **E-mail** list box, make sure the client that is displayed is the e-mail client you are using. If another email client is displayed, select the correct email client from the **E-mail** list box and click the **OK** button.

To configure access to Desktop Messaging on subscribers' computers

On each subscriber computer:

1. Start Desktop Messaging for the first time on the client computer.|
   The Desktop Messaging Logon page appears.
2. In the **Server** box type the IP address.
3. In the **Password** and **Mailbox** boxes, enter the subscriber's password and mailbox numbers.
   The email client opens.

To set the Timezone and Daylight Savings Time settings

1. Start CallPilot Manager. For information about logging onto CallPilot Manager, refer to the *CallPilot Manager Set Up and Operation Guide*.
2. Click the **Configuration** heading.
3. Click the **System Properties** link.
   The System Properties page appears.
4. Select the timezone you are in from the **Timezone** list box. The timezone controls the deliver and receive settings for Desktop Messaging.
5. Select the **Daylight Savings Time** check box at the start of Daylight Savings Time. When Daylight Savings Time ends, clear the check box. This setting ensures that the message times for Desktop Messaging are correct.
6. Click the **Submit** button.

Configuring Outlook 2002

Outlook 2002 handles mail accounts differently than previous versions of Outlook. This section describes how to configure the Desktop Messaging options for Outlook 2002.

To set Desktop Messaging options

1. In Outlook, on the **Tools** menu, click **E-mail Accounts**.
   The E-mail Accounts wizard appears.
2. Choose **View or change existing e-mail accounts**, and then click **Next**.
3. In the e-mail account list, choose **CallPilot Desktop Messaging**, and then click **Change**.
   The Desktop Messaging options dialog box appears.
4. Make changes to Desktop Messaging settings, as required, and then click the **OK** button.
5. Click **Finish** to exit the E-mail Accounts wizard.

Using Outlook 2002 as an Internet mail client

In Outlook 2002, Corporate mode and Internet Mail do not exist. Instead, the subscriber can manage all Exchange server, IMAP and POP server, and Web-based e-mail accounts from the same interface.

This section describes how to configure Outlook 2002 as an Internet mail client that works with Desktop Messaging for Internet Mail clients.

If the subscriber uses Desktop Messaging with an Exchange Server, you should install Desktop Messaging for Outlook on their computer. The Desktop Messaging installation program automatically configures Outlook with the required settings.

To define the CallPilot mailbox settings

1. In Outlook, on the **Tools** menu click **E-mail Accounts**.
   The E-mail Accounts wizard appears.
2. Select **Add-a new e-mail account**, and then click **Next**.
   The E-mail Servers page appears.
3. Select **IMAP**, and then click **Next**.
   The Internet E-mail Settings (IMAP) page appears.
4. Specify the settings for the subscriber's CallPilot mailbox.
   - **User Information**—Type the subscriber's name and CallPilot address in the boxes. Enter the address in the form:

     <SMTP/VPIM prefix><mailbox number>@<local CallPilot server>
   - **Logon Information**—Type the subscriber's CallPilot mailbox number and password in the boxes.

- Do not select the **Log on using Secure Password Authentication (SPA)** check box.
- **Server Information**—Enter the CallPilot fully qualified domain name (FQDN) for both the incoming and outgoing servers.

5 Click **Next**.
A message appears that confirms the changes.

6 Click **Finish**.

To configure access to the CallPilot Address Book

1 In Outlook, on the **Tools** menu click **E-mail Accounts**.
The E-mail Accounts wizard appears.

2 Select **Add a new directory or address book**, and then click **Next**.

3 Select **Internet Directory Service (LDAP)** and then click **Next**.

4 In the **Server Name box**, type the CallPilot FQDN.

5 Click **Next**.
A message appears that confirms the changes.

6 Click **Finish**.

To configure text formatting

1 In Outlook, on the **Tools** menu click **Options**.

2 Click the **Mail Format** tab.

3 In the **Message Format** section, select **Plain Text**.

4 Click **OK**.

Configuring Novell GroupWise

This section is an overview of how GroupWise is integrated with CallPilot. For information on how to use GroupWise to address, compose, open, delete, and perform other CallPilot operations, refer to the *CallPilot 100/150 Desktop Messaging Quick Reference Guide* or the online Help.

Note: If the subscriber uses Novell GroupWise they must have Windows Messaging 4.0 installed on their computer. This is normally the case when Windows is installed on a computer. However, if Windows Messaging 4.0 is not installed, the GroupWise installation gives you these options:

- Install the complete Windows Messaging system.
- Leave Windows Messaging as is.

Install the Complete Windows Messaging system even if Windows Messaging is already installed. This ensures that the GroupWise option is available during Desktop Messaging installation.

Removing the CallPilot Message Store

When you install Desktop Messaging on the computer of a subscriber who uses GroupWise, the folder is added to the subscriber's GroupWise mailbox.

You or the subscriber can use this procedure to remove the CallPilot Message Store from GroupWise.

To remove the CallPilot Message Store

1. Click the Windows **Start** button, point to **Settings** and click **Control Panel**.
   The Control Panel window appears.
2. Click the **Add/Remove Programs** icon.
   The Add/Remove Programs Properties dialog box appears.
3. In the list select **CallPilot Desktop Messaging for Novell GroupWise**.
4. Click the **OK** button.

Configuring GroupWise for Desktop Messaging

1. Start GroupWise.
2. On the **Tools** menu click **CallPilot**, point to **CallPilot Configuration**, and click **CallPilot Configuration Menu**.
   The CallPilot Desktop Messaging dialog box appears.
3. In the **Server** box enter the CallPilot 100/150 system name or IP Address.
4. In the **SMTP/VPIM prefix** box **enter** the SMTP/VPIM prefix of the subscriber's address. If the Network Messaging option is not enabled leave this box blank. If Network Messaging is installed, enter the value in CallPilot Manager, in the Digital Networking Properties page, in the Local Prefix box.

5 In the **Mailbox** box, enter the subscriber's mailbox number.

6 At **Check for new messages** (Automatically/Manually), if the subscriber uses ISDN or dialup, select **Manually**. This option saves on toll charges by not continuously checking for new messages on CallPilot 100/150.

7 Select **Include original message header when forwarding or replying**. This adds header information to each forward or reply, so that Desktop Messaging messages are consistent with other email messages. Subscribers can disable this feature if they wish to.

8 Select the **Remember password** check box if the subscriber does not want to enter their password each time they log on.

9 Click the **Address Book** tab.

10 In the **Path** box enter the location of the local CallPilot address book.

11 From the **Order** list box, select the order in which you want the names to be displayed in the address book.

12 Select the **Remind me to download address book every __ day(s**) if subscribers want to download addresses automatically from the system. The default is every 20 days. Subscribers can change the number of days, if they want to. If subscribers do not want to download the address book, do not select this check box.

13 If you want to download the address book now, click the **Download now** button. Subscribers can click this button whenever they want to download the address book.

14 Click the **Apply** button.

15 Click the **Audio** tab.

16 Select the **Choose audio device before each audio session** check box if the subscriber does not use either the telephone or computer to listen to their messages on a regular basis.

17 Click the **Download file before playing** check box if the subscriber wants to download messages before they play them. After the message downloads, the subscriber can play the message additional times without delay, and use GroupWise to forward it to another CallPilot subscriber.

18 From the **Audio device** setting, select either **Computer** or **Telephone** as the playback and recording device. If you select **Telephone**, enter a telephone number and click **Add**. All telephone numbers are stored, which is useful if the subscriber listens to or records messages from multiple locations.

19 Click the **Apply** button.

20 Click the **Volume Control** tab.

21 Select the default speaker and microphone volumes from this tab. The microphone level can be changed only from this dialog box. The subscriber can change the volume level and the volume control on the player from this dialog box. The selected volume level is used for future player sessions.

22 Click **OK** to save your changes and close the dialog box.

Configuring Lotus Notes

Updating the Mail database

In Lotus Notes, the Mail database design determines which messages appear in the Notes message list. There are two ways to update the database design for Desktop Messaging:

- **automatic update**: this updates the database automatically when you install Desktop Messaging (recommended).
- **manual update**: you or the subscriber must update the database manually after you install Desktop Messaging.

We recommend the automatic update option. It provides the optimal configuration for message storage, is compatible with customized database designs, and does not require any manual updates to the database design.

Updating the database automatically

To automatically update the Mail database, select the Update Lotus Notes Databases option when you install Desktop Messaging. When the installation is complete, Desktop Messaging is ready to use and does not require any manual changes to the Mail database.

When you use this update method, Lotus Notes stores CallPilot messages in a separate folder. This configuration lets users easily prioritize CallPilot messages since they are not mixed with other e-mail messages.

Updating the database manually

You should update the database design manually only if:

- the subscriber wants CallPilot messages stored in the same Inbox as their Lotus Notes e-mail messages
- the subscriber's database design has not been customized, and the subscriber does not intend to customize the database design in the future
- you are familiar with modifying Lotus Notes database design

To perform a manual update, you must replace the current database design using a CallPilot template. Replacement of the database design removes any customization in the current database design.

To update the Mail database design manually

1. Start Lotus Notes.
2. On the **Help** menu select **About Notes Desktop**.
   Make a note of the version of Lotus Notes.
3. Click the **Mail** database. The Mail database has the subscriber's name and the envelope icon.

4 On the **File** menu, click **Database**, and then click **Replace Design**.
The Replace Database Design dialog box appears.

5 Select **Template Server**.
The Template Server window appears.

6 Select **Local**, and then click **OK**.

7 Select the **Show advanced templates** check box.

8 From the list box, select the version of CallPilot Mail for the version of Lotus Notes that you use.

9 Click **Replace**.
A message appears that asks you to confirm your request to change the database view.

10 Click **Yes**.

Configuring Internet Mail clients

CallPilot Desktop Messaging supports these Internet mail clients:

- Outlook Express
- Outlook in Internet mail mode
- Netscape Messenger
- Eudora Pro

Note: You must use at least the minimum supported version of the Internet mail client. In particular, Netscape Messenger versions earlier than 4.5 are incompatible with CallPilot Desktop Messaging. Your Information Systems administrator can give you more information on upgrading your Internet mail client.

You need the following information to configure your Internet mail client:

- the FQDN or IP address of CallPilot 100/150
- the subscriber's CallPilot mailbox number and password
- the SMTP/VPIM prefix of CallPilot 100/150. If you use Message Networking, include this prefix. Enter the value from the Local Prefix box of the Digital Networking Properties page in CallPilot Manager.

You can provide this information to subscribers if you want them to configure the client.

Configuring Outlook Express or Outlook in Internet Mail mode

If your Internet mail client is Microsoft Outlook Express or Outlook, use the following procedures.

Configuring an IMAP account on Outlook or Outlook Express

1. Start Outlook.
2. On the **Tools** menu, select **Services**.
   The Internet Accounts screen appears.
3. Click **Add**, and then click the appropriate **Mail** option.
   The Internet Connection Wizard starts up.
4. In the **Display name** box type your name.
5. Click the **Next** button.
   The Internet Connection Wizard - Internet E-mail Address screen appears.

6 In the **E-mail address** box type the subscriber's CallPilot address in the form

<SMTP/VPIM prefix><mailbox number>@<local CallPilot 100/150 system>.
For example: 14165556003@voiceserver.ca.result.com, where:

- 1416555 is the SMTP/VPIM prefix. If you use Message Networking, include this prefix.
- 6003 is the CallPilot mailbox number
- voiceserver.ca.result.com is the FQDN of the CallPilot 100/150 system. If your network does not use DNS, enter <hostname>.localdomain as the FQDN (where the hostname is that of the CallPilot 100/150 system)
  or
  if you are not using a DNS environment, instead of the FQDN type the IP address of the CallPilot.

7 Click the **Next** button.
The E-Mail Server Names screen appears.

8 From the list box choose **IMAP** as the incoming mail server type.

9 In the **Incoming mail server** box type your FQDN, or if you are not using a DNS environment, type the IP address of the CallPilot.

10 In the **Outgoing mail server** box type your FQDN, or if you are not using a DNS environment, type the IP address of the CallPilot.

11 Click the **Next** button.
The Internet Mail Logon screen appears with the subscriber's IMAP account name displayed.

12 In the **Password** box type the subscriber's CallPilot mailbox password.
Do not select the Log on using Secure Password Authentication (SPA) check box.

13 Click the **Next** button.
The Internet Connection Wizard - Internet Mail Logon screen appears.

14 In the **Account name** box type the subscriber's SMTP/VPIM prefix and mailbox number.

15 In the **Password** box type the subscriber's mailbox password.

16 Click the **Next** button.
The Internet Connection Wizard - Congratulations screen appears.

17 Click the **Finish** button and close the Internet Accounts screen.
A message appears that asks if you want to download folders from the mail server you added.

18 Select the **Yes** button to download the folder list for the IMAP account that you just created
or
select the **No** button if you do not want to download the folder list at this time.
Tip: To make changes to your new IMAP account, select the account name and click Properties to display the Properties page.

19 Click the **OK** button.

Configuring an LDAP directory service for Outlook Express or Outlook

1. Start Outlook.
2. On the **Tools** menu, click **Accounts**.
   The Internet Accounts screen appears.
3. Click the **Directory Service** tab.
4. Click the **Add** button and click **Directory Service**.
   The Internet Connection Wizard starts.
5. In the **Internet directory (LDAP) server** box type the FQDN or IP address of the CallPilot 100/150.
   Do not select the My LDAP server requires me to log on check box.
6. Click the **Next** button.
   The Internet Connection Wizard - Check E-mail Addresses screen appears.
7. If the subscriber wants to check for addresses in the CallPilot LDAP directory when they address messages, select **Yes**.
8. Click the **Next** button.
   The Internet Connection Wizard - Congratulations screen appears.
9. Click the **Finish** button.
   The Internet Accounts screen appears.
10. Click the **Properties** button, and then click the **Advanced** tab.
11. If your network is slow, move the slide bar under **Search timeout** toward **Long** to increase the timeout.
12. If the subscriber expects to do directory searches that return more matches than the number shown, increase the number in the **Maximum number of matches to return** box.
13. In the **Search base** box type the search base for the CallPilot directory.
    The search base is *ou=users,ou=callpilot*.
14. Click the **OK** button.
    The Internet Accounts screen appears again.
15. If the subscriber wants to check for addresses in the CallPilot LDAP directory, click the **Set Order** button. The Directory Services Order screen appears. If necessary, use the **Move Up** or **Move Down** buttons to position the CallPilot LDAP directory in the search order.
16. Click the **OK** button.
    The Internet Accounts screen appears.
17. Click the **Close** button.

Configuring special settings for Outlook Express or Outlook in Internet Mail mode

1. Select the settings for the type of Outlook the subscriber uses.
   - If the subscriber uses Outlook Express:
     a. On the **Tools** menu, click **Options**.
        The Options screen appears.
     b. Click the **Send** tab.
     c. From **Mail sending format**, select **Plain Text**.
     d. Click the **Plain Text Settings** button.
        The Plain Text Settings screen appears.
     e. From **Message format**, select **MIME**.
     f. From the **Encode text using** list box, select **None**.
     g. Click the **OK** button.
     h. Click the **OK** button.
   - If the subscriber uses Outlook 98:
     a. On the **Tools** menu, click **Options**.
     b. Click the **Mail Format** tab.
     c. From **Send in this message format**, select **Plain Text**.
     d. Click the **OK** button.
2. If the subscriber has addresses from the CallPilot LDAP directory in their Outlook Express or Outlook 98 personal address book:
   - In the Address Book, right-click the recipient's name.
   - Select **Properties**, and then select the **Name** tab.
     The Properties screen appears.
   - Select the **Send E-Mail using plain text only** check box.
   - Click the OK button.

Testing the Outlook Express or Outlook in Internet Mail mode IMAP account

1. Use your telephone to log on to your CallPilot mailbox.
2. Compose a test voice message and send it to the subscriber.
3. Have the subscriber check that the message appears in their Inbox.

Configuring Netscape Messenger 4.x

If the subscriber uses Netscape Messenger version 4.x as their Internet Mail client, use these procedures. If the subscriber uses Netscape Messenger 6.2, refer to "Configuring Netscape Messenger 6.2" on page 43.

Notes:

- If the subscriber uses Netscape with POP for email, Netscape cannot be configured with IMAP at the same time. You must set up a different Netscape subscriber profile.
- If the subscriber uses Netscape for their email, Netscape cannot be configured to send mail to CallPilot, since only one SMTP server can be configured. You must set up a different Netscape subscriber profile.
- You need Netscape Messenger 4.5 or later. Netscape Messenger versions prior to 4.5 are incompatible with CallPilot Desktop Messaging.

Configuring an IMAP account on Netscape Messenger

1. Start Netscape Messenger.
2. On the **Edit** menu, select **Preferences**.
3. From the **Mail & Newsgroups** category, select **Identity**.
   The Preferences screen appears.
4. In the **Your name** box, type the subscriber's name.
5. In the **Email address** box enter the subscriber's email address in the form <SMTP/VPIM prefix><mailbox number>@<local CallPilot 100/150 system>.

   For example: 198887002@voiceuser.factor.com, where

   - 19888 is the SMTP/VPIM prefix
   - 7002 is the subscriber's CallPilot mailbox number
   - voiceuser.factor.com is the FQDN of the CallPilot 100/150 system. If your network does not use DNS then use <hostname>.localdomain as the FQDN (where hostname is that of the CallPilot 100/150 system).
6. From the **Mail & Newsgroups** category, select **Mail Servers**.
   The Preferences screen appears.
7. Click the **Add** button.
   The Mail Servers Properties screen appears with the General tab displayed.
8. In the **Server Name** box type the FQDN of the CallPilot 100/150 system.
9. In the **User Name** box type the part of the subscriber's CallPilot mail address that comes before the @ sign.
10. In the **Check for mail every ___ minutes** box type how frequently you want Netscape Messenger to check for new messages.
11. Select the **IMAP** tab.

12 From **When I delete a message**, select **Mark it as deleted**.

13 Select the **Clean up ("Expunge") Inbox on exit** check box.

14 Click the **OK** button.
You return to the Mail Servers screen.

15 In the **Outgoing mail (SMTP) server** box type the FQDN or IP address of the CallPilot 100/150 system.

16 In the **Outgoing mail server user name** box type the FQDN or IP address of the CallPilot 100/150 system.

17 From the **Mail & Newsgroups** category, select **Addressing**.

18 From **Pinpoint Addressing**, select both **Address Books** and **Directory Server**.

19 From the **Mail & Newsgroups** category, select **Messages**.

20 From the **By default, forward messages** list box, select **As Attachment**.

21 From **Send messages that use 8-bit characters**, select **Using the "quoted printable" MIME encoding**.

22 From the **Mail & Newsgroups** category, select **Copies and Folders**, and make sure all the check boxes are clear.

23 From the **Mail & Newsgroups** category, select **Formatting**.

24 From **Message formatting**, select **Use the plain text editor to compose messages**.

25 From the **Mail & Newsgroups** category, select **Return Receipts**.

26 From **If I request a receipt when sending a message, I want**, select **A delivery receipt from the receiving server (DSN)**.

27 From **When a receipt arrives**, select **Leave it in my Inbox**.

28 Click the **OK** button.

Configuring an LDAP directory service for Netscape Messenger

1. Start Netscape Messenger.
2. On the **Communicator** menu, select **Address Book**.
   The Address Book screen appears.
3. On the **File** menu, select **New Directory**.
   The Directory Server Property screen appears.
4. In the **Description** box, type a descriptive name for the subscriber's CallPilot directory service.
5. In the **LDAP server** box, type the FQDN of the CallPilot 100/150 system.
6. In the **Search Root** box, type the search base.
   Use the search base *ou=users,ou=callpilot*
7. Click the **OK** button.
8. Go to "Testing the Netscape Messenger IMAP account" on page 44 to test the IMAP account.

Configuring Netscape Messenger 6.2

If the subscriber uses Netscape Messenger version 6.2 as their Internet Mail client, use these procedures. If the subscriber uses Netscape Messenger version 4, refer to "Configuring Netscape Messenger 4.x" on page 40.

Notes:

- If the subscriber uses Netscape with POP for email, Netscape cannot be configured with IMAP at the same time. You must set up a different Netscape subscriber profile.
- If the subscriber uses Netscape for their email, Netscape cannot be configured to send mail to CallPilot, since only one SMTP server can be configured. You must set up a different Netscape subscriber profile.

Configuring an IMAP account on Netscape Messenger

1. Start Netscape Messenger.
2. On the **Tasks** menu, select **Mail & Newsgroups**.
   If there are no email accounts configured the Account Wizard appears. If the Account Wizard appears, go to step 4. Otherwise the Mail & Newsgroups window appears.
3. On the **File** menu, select **New** and click **Account**.
4. Select ISP or email provider and click the **Next** button.
5. In the **Your name** box, type the subscriber's name.
6. In the **Email address** box enter the subscriber's email address in the form

   <SMTP/VPIM prefix><mailbox number>@<local CallPilot 100/150 system>

   For example: 198887002@voiceuser.factor.com, where:

   - 19888 is the SMTP/VPIM prefix
   - 7002 is the subscriber's CallPilot mailbox number
   - voiceuser.factor.com is the FQDN of the CallPilot 100/150 system. If your network does not use DNS then use <hostname>.localdomain as the FQDN (where hostname is that of the CallPilot 100/150 system).
7. Click the **Next** button.
   The Server Information page appears.
8. In the **Incoming Server** section, select **IMAP**.
9. In the **Server Name** box type the FQDN of the CallPilot 100/150 system. If your network does not use DNS enter the IP address (in the form N.N.N.N) instead of the FQDN.
10. In the **Outgoing Server (SMTP)** section, in the **Server Name** box type the FQDN of the CallPilot 100/150 system. If your network does not use DNS, type the IP address instead of the FQDN.
11. Click the **Next** button.
    The User Name page shows the subscriber's mailbox number (the part of the subscriber's CallPilot mail address that comes before the @ sign).

12 Click the **Next** button.
The Account Name page appears.

13 Type a name for the CallPilot mailbox to help the subscriber to identify it in Netscape Mail.

14 Click the **Next** button.
The Congratulations page appears.

15 Verify your CallPilot mailbox information and click the **Finish** button.

16 On the **Edit** menu, select **Mail & Newsgroups Account Settings**.

17 In the **Server Settings** panel, at select **Check for new messages every 10 minutes** and change it from 10 minutes to 1 minute.

18 From the **When I delete a message** setting select **Move it to the Trash folder to Mark it as deleted**.

19 Make sure that the **Clean up ("Expunge") Inbox on Exit** setting is selected.

20 In **Copy and Folder Settings** panel, from the **"Sent" folder on:** setting select **Local Folders**.

21 From the **"Drafts" folder on:** setting select **Local Folders**.

22 From the **"Templates" folder on:** setting select **Local Folders**.

23 Click the **OK** button.

Configuring an LDAP directory service for Netscape Messenger

1 On the **Edit** menu, select **Preferences**.

2 Double-click **Mail & Newsgroups**.

3 In the **Addressing** panel, select **Directory Server**. Click the **Edit Directories** button.
The LDAP Directory Servers window appears.

4 Click the **Add** button.
The Directory Server Properties window appears.

5 In the **Name** box type the FQDN of the CallPilot 100/150 system. If your network does not use DNS type the IP address (in the form N.N.N.N) instead of the FQDN.

6 In the **Hostname** box type the hostname of the CallPilot 100/150 system, or another unique identifier.

7 In the **Base DN** box type the string *ou=users,ou=callpilot* and click the **OK** button.

8 Click the **OK** button to close the LDAP Directory Servers window.

9 Go to "Testing the Netscape Messenger IMAP account" on page 44 to test the IMAP account.

Testing the Netscape Messenger IMAP account

1 Use your telephone to log on to your CallPilot mailbox.

2 Compose a test voice message and send it to the subscriber.

3 Have the subscriber check that the message appears in Netscape Messenger.

Configuring Eudora Pro

To change any part of this configuration after it is complete, on the **Tools** menu click **Options** to display the configuration screens.

Configuring an IMAP account on Eudora Pro

1. Double click the **Eudora Pro** icon.
   The New Account Wizard - Welcome to Eudora Pro! screen appears.
2. Click the **Next** button.
   The New Account Wizard - Account Settings screen appears.

   Note: If you have another IMAP account for your CallPilot mailbox, you can import the settings. This configuration assumes that the Eudora IMAP account is a new configuration.

3. From **Would you like to**, select **Create a brand new email account**.
4. Click the **Next** button.
   The New Account Wizard - Personal Information screen appears.
5. In the **Your Name** box, type the subscriber's name.
6. Click the **Next** button.
   The New Account Wizard - E-Mail Address screen appears.
7. In the **E-Mail Address** box type the subscriber's CallPilot mail address.

   Enter the subscriber's email address in the form
   <SMTP/VPIM prefix><mailbox number>@<local CallPilot 100/150 system>.

   For example: 14164067001@voiceuser.factor.com, where:

   - 1416406 is the SMTP/VPIM prefix
   - 7001 is the subscriber's CallPilot mailbox number
   - voiceuser.factor.com is the FQDN of the CallPilot 100/150 system. If your network does not use DNS, use <hostname>.localdomain as the FQDN (where hostname is that of the CallPilot 100/150 system).

8. Click the **Next** button.
   The New Account Wizard - Logon Name screen appears.
9. Check that the **Logon Name** box contains the part of the subscriber's CallPilot mail address that comes after the @ sign, and click the **Next** button.
   The New Account Wizard - Incoming E-Mail Server screen appears.
10. Check that the **Incoming Server** box contains the FQDN of the CallPilot 100/150 system.
11. From **Please choose whether the server for your incoming mail uses POP or IMAP**, select **IMAP**, and click the **Next** button.
    The New Account Wizard - IMAP Location Prefix screen appears.

12 Click the **Next** button without entering a location prefix.
The New Account Wizard - Outgoing E-Mail Server screen appears.

13 Check that the **Outgoing Server** box contains the FQDN or IP address of the CallPilot 100/150 system, and then click the **Next** button.

14 Click the **Finish** button.

15 On the menu bar, on the **Tools** menu click **Options**.

16 From the **Category** heading click the **Attachments** icon.
The Options screen appears.

17 From **Encoding method**, select **MIME**.

18 From the **Category** heading, click the **Styled Text** icon.

19 From the **When sending mail with styled text (HTML)**, select **Send plain text only**.

20 Click the **OK** button.
You return to the main screen.

Configuring an LDAP directory service for Eudora Pro

1. Start Eudora Pro.
2. On the **Tools** menu click **Directory Services**.
3. From the **Protocols** box, select **LDAP**.
4. Click the **New Database** button.
   The Modify Database screen appears.
5. Click the **Network** tab.
6. In the first box, type a descriptive name for the CallPilot directory service.
7. In the **Host Name** box, type the FQDN or the IP address of the CallPilot 100/150 system.
8. Click the **Search Options** tab.
9. If your network is slow, move the slide bar under **Search timeout** toward **Long** to increase the timeout.
10. In the **Search Base** box type the search base for the CallPilot directory. The search base is *ou=users,ou=callpilot*
11. Click the **OK** button.
    You return to the Directory Services screen.

Testing the Eudora Pro IMAP account

1. From your telephone to log on to your CallPilot mailbox.
2. Compose a test voice message and send it to the subscriber.
3. Have the subscriber check that the message appears in their Eudora Pro client.

Chapter 4
Troubleshooting

This chapter is about:

- Troubleshooting during installation
- Troubleshooting log on problems
- Troubleshooting Outlook 2002 problems
- Troubleshooting Lotus Notes log on problems
- Troubleshooting after logging on
- Accessing Desktop Messaging online Help
- Using Desktop Messaging Support Tools
- Using CPTrace

This chapter discusses problems that subscribers can experience with Desktop Messaging. The troubleshooting information is divided into problems and suggested solutions. Based on the expertise of subscribers, you can ask them to do some of the troubleshooting procedures.

If the suggested solution does not correct the problem, contact your Nortel Networks representative.

The problems discussed here apply to all clients unless otherwise noted. Perform the suggested solutions from the desktop computer, or, where noted, on CallPilot 100/150 or CallPilot Manager.

Troubleshooting during installation

Before you begin to install Desktop Messaging for Microsoft Outlook, GroupWise, or Lotus Notes, you require:

- the subscriber's CallPilot mailbox number
- the fully qualified domain name or IP address of CallPilot 100/150
- the SMTP/VPIM prefix of CallPilot 100/150

Note: Before you install Desktop Messaging, make sure the Integrated Client (Microsoft Outlook, GroupWise, or Lotus Notes) is working properly.

Obtaining the Desktop Messaging version number

1. If the subscriber cannot log on, but you require the CallPilot version number, navigate to: windows\system\nmdcva.exe
2. Right-click the file and select **Properties**.
   The Properties page appears.
3. Select the **Version** tab.
   The version number for Desktop Messaging is displayed.

Microsoft Outlook default mail client

You see the error message when you install Desktop Messaging: “Either Outlook is not the default mail client or there is no default mail client to fulfill the current request.” If Outlook is installed on the subscriber’s computer but they do not want Outlook to be their default mail client, they can change to another client after Desktop Messaging is installed.

To define Outlook as the default mail client:

1. Click the Windows **Start** button, point to **Settings** and click **Control Panel**.
   The Control Panel window appears.
2. Double-click the **Internet Options** icon.
   The Internet Properties dialog box appears.
3. Click the **Programs** tab.
4. From the **E-mail** list box, select **Microsoft Outlook**.
5. Click the **OK** button.

No authorization to perform this operation

Subscribers must have Manager or Designer access control of the mail database to install Lotus Notes Desktop Messaging. The Lotus Notes administrator sets this control on the server for each subscriber. The default is Manager access.

To determine the level of access control for a subscriber:

1. From the subscriber’s Lotus Notes Mail database, click **File**, click **Database**, and click **Access Control**.
2. Click the subscriber’s name in the displayed list.
   The subscriber’s access control level appears in the Access box. The choices are Manager, Designer, Editor, Author, Reader, Depositor, and No Access.
   For a subscriber to install Desktop Messaging, Manager or Designer must be displayed.
3. If neither Manager nor Designer is selected:
   - — you must temporarily give the subscriber Manager or Designer access

     or
   - — the Lotus Notes administrator must manually update the Mail database from the server for each subscriber who needs CallPilot access

This update creates a new view, CallPilot Desktop Messaging, in Lotus Notes.

To update a CallPilot subscriber Mail database from the server:

1. Install CallPilot Desktop Messaging on the Lotus Notes server computer by running **Server**, **setup.exe**.
2. Start **Update database design**.
3. To locate the Update database design program, click **Start**, point to **Programs**, point to **Nortel CallPilot Desktop** and click **Update database design**.

4 From **Update CallPilot Mail databases**, select **Add CallPilot components** or R**emove CallPilot components**.

5 Click **OK**.

6 From the **Select database(s)** dialog box, select one or a group of mail files to update.

7 Click **OK**.

Troubleshooting log on problems

Invalid credentials

The subscriber sees messages such as “Invalid credentials. Please retry” or “The server could not be located. Please Retry.”

1 On the subscriber’s computer, check that Desktop Messaging is configured with the proper settings. Verify that the following information is correct:

- mailbox number
- fully qualified domain name (FQDN) or IP address of CallPilot 100/150
- the SMTP/VPIM prefix, if any, of CallPilot 100/150

2 Check that you can log on from the telephone using the same mailbox number and password.

3 Test that you have network connectivity to CallPilot 100/150
Issue a network command to CallPilot 100/150 exactly as it appears in your Desktop Messaging configuration. Try to ping using the DOS prompt, and ensure that you receive a valid response from CallPilot 100/150. If you do not have network connectivity to CallPilot 100/150, you are not able to access Desktop Messaging.

These steps are applicable only in a DNS enabled environment:

4 Ensure that DNS is configured on this computer. Under **TCP/IP properties**, click the **DNS** tab. Ensure that a DNS server is listed. Verify that it is the correct IP address for the DNS server.

5 Check with the DNS administrator whether the server name is in the DNS server. Verify that the correct hostname is configured in the DNS server.

6 Check that the CallPilot FQDN is properly configured in the DNS server.

CallPilot Logon Failure

The subscriber sees a message that their computer is not connected to the network.

Microsoft®
Outlook®
CallPilot Logon Failure
Your computer does not appear to be connected to the network.
Would you like to retry the connection or work offline?
Retry
Work offline
54187-640-0413303-17775
Copyright© Microsoft Corporation 1995-2001.
All rights reserved. This program is protected by US and international copyright laws as described in Help About.

Tell the subscriber to contact their network administrator.

Troubleshooting Outlook 2002 problems

These are issues with how Desktop Messaging works with Outlook 2002. These issues should be resolved with a future Outlook service release patch from Microsoft.

Sending messages

When a subscriber who uses Outlook 2002 creates a CallPilot message in the CallPilot window, Outlook does not automatically send the message when the subscriber clicks the Send button. To send the message, the subscriber must click the Send/Receive button on the Outlook toolbar. We recommend subscribers install Outlook SP 1 from Microsoft, which fixes this issue.

Accessing CallPilot support tools in Outlook 2002

This section describes how to use CallPilot support tools specific to Desktop Messaging for Outlook 2002.

To reset the CallPilot Message Store in Outlook 2002

1. On the subscriber's computer, press the **Ctrl** and **Shift** keys.
2. In Outlook, on the **Tools** menu, click **Send/Receive**, **Accounts**, **CallPilot Transport**.
3. Continue to press the **Ctrl** and **Shift** keys until the CallPilot Reset Mailbox dialog box appears.
4. Click **Reset Mailbox**.

To access the Outbox Fix utility in Outlook 2002

1. In Outlook, on the **Tools** menu click **E-mail accounts**.
   The E-mail Accounts wizard appears.
2. Select **View or change existing e-mail accounts**, and then click **Next**.
3. In the e-mail account list, select **CallPilot Desktop Messaging**.
4. While you press the **Ctrl** and **Shift** keys, click **Change**.
   The CallPilot Outbox Fix dialog box appears.
5. Click **Fix outbox**.

Troubleshooting Lotus Notes log on problems

When Desktop Messaging is installed, Desktop Messaging appears under Folders and Views. In the Personal Name and Address Book on Local database, two new views are created:

- Groups (CallPilot)
- People (CallPilot)

Note: In Lotus Notes 5.0, these views are accessible only from the View menu. In Lotus Notes 5.0 subscribers must log on to CallPilot before they can download the address book.

In Lotus Notes 6.0 these views are accessible from the Contacts menu.

Subscribers cannot see CallPilot Desktop Messaging

When the subscriber logs on, they do not see Desktop Messaging.

1. Verify that the subscriber is in **Folders and Views**.
2. If they do not see Desktop Messaging and they are in Folders and Views, ask the subscriber to uninstall the current version of CallPilot, and then reinstall it. When they reinstall, tell them to make sure that when they reach the Ready to Install window they select the Update Lotus Notes databases check box.

Note: Even if the subscriber does not select the check box, you can manually update the Mail database design.

Replace the Mail database design only if you have not customized Lotus Notes. If you replace the database design, any customization is removed.

You require Manager or Designer-level access to update the Mail database design.

Replacing the Mail database design

The Lotus Notes administrator can replace the Mail database design from the Lotus Notes server.

To update the Mail database design:

1. Copy the file cpmail50.ntf for Lotus Notes 5.0 into the notes/data directory on the Lotus Notes server.
   If you use Lotus Notes 6.0, run LNSERVER.EXE to copy the cpmail60nltf file.
2. Use **File > Database > Open** to add the mail database icon that you are going to update.
3. Select this icon.
4. Select **File > Database > Replace design**.
5. In the **Replace Database Design window**, select the **Show advanced templates** check box.

6 Make sure that:

- the Inherit future design changes check box is selected
- Hide formulas and LotusScript is not selected

7 Select **CallPilot Mail (R5.0)** or **(R6.0)**, depending on which version of Lotus Notes you use.

8 Click **Replace**.

9 Press **F9** to refresh the window and display the names.

No entries in CallPilot Personal Name and Address Book

While in the Personal Name and Address Book window, the subscriber selects People (CallPilot) and does not see any entries in the CallPilot Address Book.

Ask the subscriber to download the CallPilot Address Book manually and update the Personal Address Book template.

To manually download the CallPilot Address Book:

1 Make sure that Address Book—People (CallPilot) window is the active window.

2 On the **Actions** menu, select **Download CallPilot Address Book**.

The dynamic link library nNOTES.dll could not be found in the specified path

1 On your desktop, right-click the **Lotus Notes** icon, select **Properties**, and then click the **Shortcut** tab.

2 Examine the properties of your Lotus Notes shortcut.

3 Verify the path in the **Start in** box.
Note: Usually, when Lotus Notes creates a shortcut, it puts a working directory in this box.

4 Add or update the path.

You download the CallPilot address book and 0 entries are found

1 Check the **CallPilot Address Book** search base.
Search base is configured under **Actions > CallPilot Desktop Messaging > CallPilot Desktop Messaging**. Select the **Address Book** tab.

2 Verify that the search base is exactly as it is configured on the CallPilot Administration Client.

Troubleshooting after logging on

The CallPilot address book is empty

Lotus Notes subscribers must log on to CallPilot before they can download the address book.

1. Make sure that your **Address Book—People (CallPilot)** window is the active window.
2. On the **View** menu, click **Refresh**.
3. Make sure the CallPilot Address Book has been downloaded.

Outlook and GroupWise clients:

1. Click **Download CallPilot Address Book**.
2. If it responds with 0 entries found, verify that the search base is correct.

The subscriber has message access problems

The subscriber has modified the settings so that they are now correct, but the subscriber still cannot access their messages.

If you modified the settings while Desktop Messaging was open, close and reopen Desktop Messaging so that the settings take effect.

The subscriber has problems sending messages

When the subscriber sends a message, it arrives in the recipient's Outlook mailbox, but it does not arrive in the CallPilot message mailbox.

1. Ensure that when you address the message, you locate the recipient's address in the CallPilot Address Book. If the recipient is defined in your Personal Address Book, then ensure that the Personal Address Book entry is a CallPilot address.
2. To ensure that the recipient is defined as a CallPilot Address type, highlight the name, click **Properties**, and verify that the Address Type=CallPilot.
3. Before you send the message, in the To field, highlight the Recipient, click **Properties**, and verify that the Address Type=CallPilot.

In sent messages digits or symbols appear instead of language-specific symbols

The only character sets that are supported are us-ascii and ISO-8859-1. The messaging client must be configured to use ISO-8859-1 character encoding, usually displayed as the option Western (ISO-8859-1) or Western European ISO in most e-mail applications. This does not restrict users in other countries from using text messaging, only which character sets can be used to compose and send these messages.

Messages remain in the subscriber's Outbox

On Microsoft Outlook, messages remain in the mail client outbox (not the CallPilot Message Store outbox). This problem can be caused by the migration from one server to another while maintaining the same Outlook client.

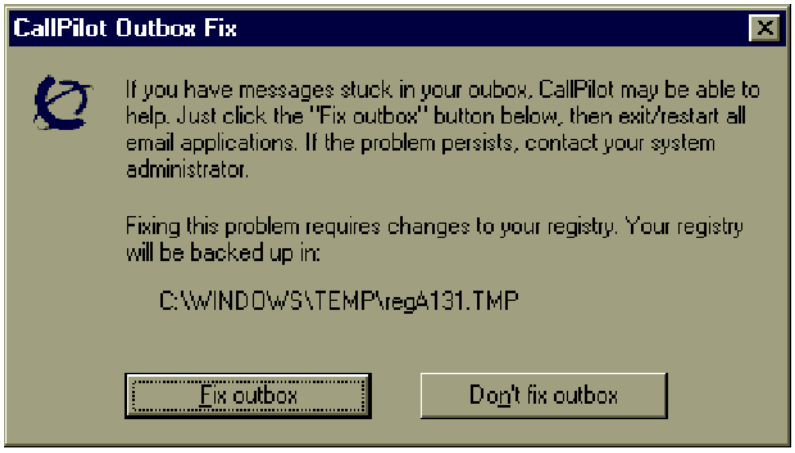
Remove the Outlook server, then re-add it to the subscriber's profile.

To fix the Outbox:

1 On the subscriber's computer, on the **Tools** menu click **Services**.
The Services dialog box appears.

2 Select **CallPilot Desktop Messaging**.

3 Press the **Ctrl** + **Shift** keys, and click **Properties**.
The CallPilot Outbox Fix dialog box appears.


CallPilot Outbox Fix
If you have messages stuck in your oubox, CallPilot may be able to help. Just click the "Fix outbox" button below, then exit/restart all email applications. If the problem persists, contact your system administrator.
Fixing this problem requires changes to your registry. Your registry will be backed up in:
C:\WINDOWS\TEMP\regA131.TMP
Fix outbox
Don't fix outbox

4 Click the **Fix outbox** button.

The subscriber cannot send messages

The subscriber cannot send messages to AMIS or digital networking subscribers.

1 Make sure that the subscriber is addressing the message correctly. Refer the subscriber to "Address Formats" in their online Help.

2 Ensure the subscriber has the capability to send messages to AMIS and digital networking subscribers. Security concerns can restrict subscribers from composing messages to these types of subscribers.

The subscriber cannot send a CallPilot message

The subscriber cannot send a CallPilot message. When the subscriber clicks Send, an error message appears that says, "Error. Failed to send message."

- Ask the subscriber to check that their mailbox is not full. If their mailbox is full, they cannot send messages until some messages are deleted.
- Ask the subscriber to check the format of the message address. If the FQDN after the @ symbol does not match the FQDN of CallPilot 100/150 configured to this mailbox, the message is rejected.
- Ask the subscriber to verify that no attachment is empty. An empty attachment causes the entire message to be rejected. Delete the empty attachment and try sending the message again.

Test whether you can ping CallPilot 100/150:

1. At the DOS prompt, type:
   ping <CallPilot 100/150 FQDN>
2. If the response is "request timed out," then type:
   ping <CallPilot 100/150 IP address>

   Note: If there is a reply, then the CallPilot 100/150 FQDN has not been properly configured to your Domain Name System (DNS). Contact your DNS administrator for assistance.
3. If there is no reply, verify that CallPilot 100/150 can be reached on your LAN. Contact your IS administrator for help.
4. Verify that CallPilot 100/150 is up and running.

Non-delivery notification

The subscriber receives non-delivery notifications for messages.

1. Ask the subscriber to verify that they have a valid attachment type.
2. Ask the subscriber to make sure that their mailbox is not full.
3. Ask the subscriber to make sure that they are addressing the message correctly. See "Address Formats" in the online Help.
4. Ask the subscriber to ensure that they are attaching only VBK or WAV files to your messages. Desktop Messaging does not accept any other file types.
5. If the subscriber is sending to a remote location, ask the subscriber to verify that the address is valid and still exists.
6. Ensure that the subscriber has the capability to dial the number. Refer to the *CallPilot Manager Set Up and Operation Guide.*
7. Verify that the remote server is responding by issuing a network command on CallPilot 100/150. Internet Mail clients cannot send or receive WAV files.

"Unknown" appears in the Sender field

In some messages, the subscriber sees a name or phone number in the Sender field. In other messages, the subscriber sees “Unknown.”

If the caller’s phone system has Calling Line ID, CLID information appears in the Sender field for messages that are created when people phone you and you are not available. If CLID information is not provided, it appears as “Unknown.” For messages that are sent from people using Networking, if the sender’s name is not provided to the CallPilot system, the Sender field appears as “Unknown.”

The subscriber has problems with receiving replies

Recipients can see the subscriber’s CallPilot messages and people receive the messages that the subscriber sends, but the subscriber does not receive replies to their messages.

1. On the **Actions** menu, select **CallPilot Configuration**.
2. Click **Properties**.
3. Ensure that the SMTP/VPIM prefix is specified correctly.

Deleted messages remain in the subscriber’s mailbox

When a subscriber deletes messages using Desktop Messaging, the messages are still in the subscriber’s mailbox when they access the mailbox using the telephone.

If the messages that they delete on the desktop are still in a Deleted Items Folder in the CallPilot Message Store, the messages remain in the subscriber’s CallPilot mailbox. The subscriber still has these messages when they access them from the telephone. To remove the messages from both mailboxes, the subscriber must permanently delete them from the Deleted Items folder.

The subscriber cannot delete messages

The subscriber cannot delete their messages. When the subscriber tries to delete the messages permanently, the messages remain.

If the subscriber is using Desktop Messaging to delete these messages and they are also logged on to their mailbox from their telephone, they cannot delete messages using Desktop Messaging.

Ask the subscriber to end the telephone mailbox session, and then try to delete the messages from Desktop Messaging.

Messages no longer on server

The subscriber receives the error message: “This message could not be found on the server. Messages must exist on the server in order to be played via the telephone. Use computer to play this file. Port failed.”

Voice messages that are saved to the subscriber’s computer are no longer in their CallPilot Inbox. The subscriber cannot play these messages from the telephone. To listen to these messages, the subscriber must use computer speakers or headphones.

Voice message does not play on telephone

The subscriber plays a voice message from the telephone. The subscriber answers the telephone when it rings but the message does not play.

1. Ask the subscriber to say something like “hello,” to initiate message playback.
2. Ask the subscriber to check the CallPilot player status bar. If it states Open Pending, hang up the telephone. Click **Computer** on the player, and then click telset playback. The phone rings again.
3. Tell the subscriber that if the Status bar still says Open Pending, hang up again and wait three to five minutes and try to play the message again. If this problem continues, contact your Nortel Networks Customer Technical Support.

The Message Waiting Indicator is active but there is no new message

The subscriber’s telephone message waiting indicator is activated but there is no new message in the subscriber’s Desktop Inbox.

Messages are downloaded from CallPilot 100/150 with the same frequency as email messages (this applies only to Lotus Notes subscribers).

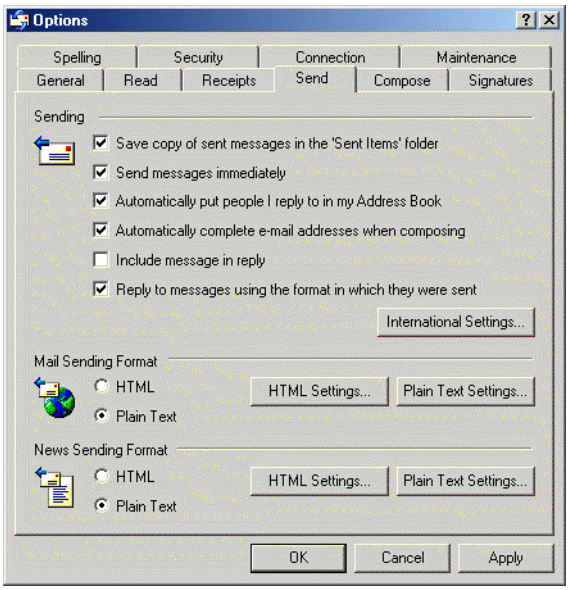
1. To adjust the frequency, on the **File** menu, select **Tools.**
2. Click **User Preference**s.
3. Click **Mail.**
4. Change the **Check for mail every __ minutes** setting.
5. If you want to check for mail immediately, on the **Actions** menu, select **Refresh CallPilot Message List**.

Forwarding or replying to messages in Outlook Express when the fax keycode has not been applied

A subscriber who forwards or replies to a voice message in Outlook Express receives non-delivery notification that the attached message cannot be delivered

This occurs because when a subscriber forwards or replies to a voice message, Outlook Express inserts a text comment. Desktop Messaging does not support this type of text comment.

For replying to a message, tell the subscriber to clear the Include Message In Reply option:



For forwarding messages, there is no option in Outlook Express to prevent inserting text when forwarding messages. The subscriber must manually remove the text content from the message. After the text has been removed the message can be sent with the forwarded voice attachments.

Accessing Desktop Messaging online Help

Desktop Messaging for Microsoft Outlook, Novell GroupWise, and Lotus Notes provides standard Help.

Note: To access Internet Mail client Help, on the Messaging Administration menu click Internet Mail Client Administration.

Internet Mail client Help contains Help for the CallPilot interface. Use the manufacturer's online Help for questions about your Internet Mail client.

To access online Help

From Microsoft Outlook:

- From your **Inbox**, on the **Help** menu, select **CallPilot Desktop Messaging Help**.

From Novell GroupWise:

- From your **Inbox**, on the **Help** menu, select **CallPilot Desktop Messaging Help**.

From Lotus Notes:

- From your **Inbox**, on the **Actions** menu, select **CallPilot Help Topics**.

Using Desktop Messaging Support Tools

Resetting the CallPilot message store for Microsoft Outlook

This feature is available only for subscribers who use Microsoft Outlook. Resetting the CallPilot message store removes invalid or corrupt messages from the Inbox.

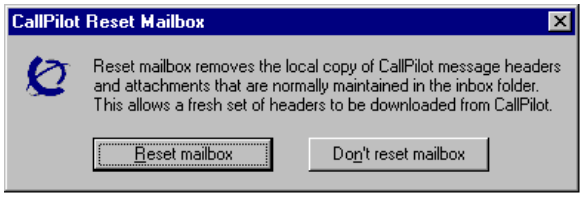
Lotus Notes and GroupWise clients can reset their mailboxes by choosing the Refresh CallPilot Message List option.

For Microsoft Outlook 98 and 2000

1 Press **Ctrl + Shift**.

2 On the **Tools** menu, click **Send and Receive**, and then click **CallPilot Transport**.

3 Press **Ctrl + Shift** until the CallPilot Reset Mailbox dialog box appears.


CallPilot Reset Mailbox
Reset mailbox removes the local copy of CallPilot message headers and attachments that are normally maintained in the inbox folder. This allows a fresh set of headers to be downloaded from CallPilot.
Reset mailbox
Don't reset mailbox

4 Select the **Reset Mailbox** button.

All CallPilot messages are purged from the subscriber's mailbox, and the CallPilot message headers that are stored for the subscriber are downloaded again. The messages disappear and then reappear one by one. All message caching is lost.

Note: The messages are not deleted from CallPilot. The messages are removed from the client computer cache. Messages are downloaded again from CallPilot 100/150 to the client computer.

This feature is intended for system administrators and CallPilot product support.

Using CPTrace

You can use CPTrace to collect information about problems with one of the desktop clients that CallPilot runs on. You save this information to a log file that you can analyze to determine the cause of the problem.

Problems you can look for include:

- trouble connecting to CallPilot 100/150
- CallPilot player problems
- address book problems
- problems with message compose, reply, forward, delete and notification

To use CPTrace, you must understand Desktop Messaging functionality and the corresponding components on the IMAP server.

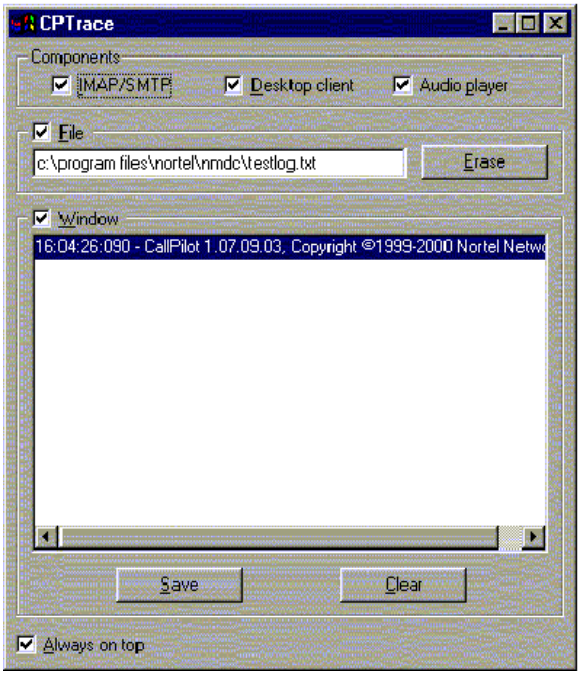
Note: Running CPTrace affects how CallPilot works. It is possible that you will not be able to reproduce problems while CPTrace is running.

CPTrace.exe is installed with each desktop client in the \Program Files\Nortel\<client directory>:

- for Microsoft Outlook, in nmdc
- for Lotus Notes in nmin
- for GroupWise in nmgw

Using CPTrace

To use CPTrace, double-click the CPTrace.exe in the corresponding desktop client directory.



CP Trace settings

The CPTrace settings are stored in the Windows registry. The existing settings are used each time you run CPTrace.

CP Trace settings	
IMAP/SMTP	Logs all IMAP/SMTP traffic
Desktop client	Logs internal Outlook, Lotus Notes and GroupWise traffic
Audio Player	Logs Audio player traffic
File	Writes logs to a file. Check this box and type a file name and extension to maintain the log. You can include a directory path such as c:\my player. When you close CPTrace with the File check box selected, the Desktop client continues to write information to the file selected. This slows down the Desktop operation slightly. The log file never gets larger than 1Mbyte. When the file size reaches 1Mbyte, 10 percent of the file is purged, starting with the oldest data. If you select the File check box and close CPTrace, you receive a warning that File tracing is still enabled and asking if you want to turn off tracing. Click Yes to leave file tracing enabled.
Window	Writes logs to the display window.
Erase	Deletes the log file from the directory you defined for it. A message appears that asks you to confirm the deletion.
Clear	Clears the display window
Save	A Save As dialog box appears that you can use to save the trace to a text file. The default file name is CPTrace.txt. This file is stored in a temporary directory.
Always on top	Check this box to keep the CPTrace tool on top of other windows.

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